

# IEEE Technology Management Council Spain IEEE Computer Society e-Government Workshop

## The Strategic Planning Documented

### Part II: Strategy Markup Language (StratML)

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## Part II: StratML

1. Good “tools” for Strategic Plans.
2. Why a machine-readable language here?
3. Strategic semantic business web
4. Definition
5. Focus & Intent
6. StratML Part 1
7. StratML Part 2
8. StratML Part 3: candidate elements
9. First context: US eGovernment Act
10. StratML Forms, Tools & Prototype Services
11. XForm
12. Links, documents & references used

## Good “tools” for Strategic Plans



## Good “tools” for Strategic Plans

Elements of strategic plans should be easily

**Shared  
Referenced  
Indexed  
Discovered  
Linked  
Reused  
Analyzed**

## Why a machine-readable language here?

Enabling the concept of "**strategic alignment**" and linking:

- goal
- objective statements
- and all other records created by organizations in their business processes.

## Why a machine-readable language here?

Discovery of **potential performance partners** who share common goals and objectives

Produce **inputs needed** or require outputs produced by the organization compiling the strategic plan

Facilitate **stakeholder feedback** on strategic goals and objectives

# Why a machine-readable language here?

## Updating and maintenance of discrete elements of strategic plans

- Without requiring review and approval of the entire plan through bureaucratic channels,
- Helping to make the strategic planning process more agile and
- Responsive to stakeholder feedback and changing circumstances,
- Thus helping to overcome the tendency of strategic plans to become outdated "shelfware".

Avoid associated elements related with maintaining data redundantly in myriad "**stovepipe**" **systems** rather than referencing the **authoritative sources**, reducing:

- Time,
- Effort,
- Inconsistencies,
- Delays



## Why a machine-readable language here?

Work together to :

- Link performance goals to key groups (stakeholders),
- Adopt **open standards** (e.g., StratML)
- Enable the organization and categorization of information **searchable electronically and interoperable**

Track and ***monitor*** the ***performance*** of organizations about whose goals you care

# Why a machine-readable language here?

In addition... more benefits

Engage employees, partners, and other stakeholders not only in crafting but also carrying out strategic goals and objectives, more efficiently and effectively.

More easily discover and participate in the establishment of goals and objectives of our company/public agencies whose missions are of particular interest to you.

Standard vocabulary and schema for strategic plans will make it easier to develop applications and services.

More easily discover those who share your values and are pursuing objectives you consider to be worthy of priority for your support/collaboration/"coopetition".

Review and provide feedback far more efficiently and effectively on the goals and objectives of companies that are truly customer focused and share their strategic plans openly.

# Strategic Semantic Business Web

- Semantic Web (of Meaning)
  - Linked Open Data
  - Tim Berners-Lee [5-Star Data](#)
- StratML: XML vocabulary and schema for strategic plans
  - Linkage of Missions, Visions, Values, Goals, Objectives, Stakeholders, Inputs, Processes, Outputs & Outcomes
    - Interoperability & Strategic Alignment
  - Worldwide Network (Web) of ***Intentions & Results!***
  - Maturation of “Social” Media/Networking Services
    - For Business-Quality Purposes

## Definition

- Strategy Markup Language (StratML) Part 1 is an XML vocabulary and schema for the elements commonly contained in strategic plans.
- StratML Part 2 extends Part 1 to include the additional elements required for performance plans and reports.
- StratML Part 3 and perhaps additional parts will incorporate additional elements that, while not deemed essential, may add value to the core elements of strategic and performance plans.

## Focus & Intent

Started in the USA but with intention to be adopted as an **international voluntary consensus standard**

Searching for accountability and optimal performance and efficiency in government, but potential use by all organizations worldwide too.

# StratML Part 1 & 2

## Part 1

ANSI/AIIM 21:2009

International Standardization

➤ ISO/TC 171/SC 2 in progress

Core Elements

1. Organization
2. Mission
3. Vision
4. Value
5. Goal
6. Objective
7. Stakeholder

## Part 2

Part 1 + ANSI/AIIM 22:2011:

**Additional Elements:**

8. Stakeholder Roles.
9. Performance Indicators

## StratML Part 2: additional elements

- Metric - At least one Objective **should** be included and a Metric **should** be associated with it.
- Outcome - At least one desired Outcome **should** be specified, because no organization should exist solely for self-serving purposes.
- Output - The Outputs required to achieve the desired Outcome(s) **should** be specified.
- Input - The Inputs required to produce Outputs **should** be specified.
- Process - The Processes required to produce Outputs and Outcomes **should** be specified.
- Stakeholder - At least one Stakeholder of the performer type should be identified, although the named performer may be an organizational role rather than a particular individual.

# StratML Part 3: Candidate Elements

Part 3 is Under Development (Participation is Open & Welcome)

- Geospatial Referencing
  - Organizations, Goals, Objectives & Stakeholders
- Citation of Legal or Other Authorities
  - Laws, Regulations & Policies
- Categorization of Goals, Objectives & Performance Indicators
  - Under Various , User-Determined Taxonomies
- Documentation of Relationships
  - Among Goals, Objectives & Performance Indicators
- Strategy Formulation Frameworks & Methods
  - SWOT &/or PEST
- Documentation of Organizational Core Competencies & Value Propositions
- Etc.



## First context: StratML for Governments

- ***Cooperation***  
between government agencies and others stakeholders (public-private partnership & citizen, etc.) to link their performance goals.
  
- Adopt ***open*** standards  
enabling the organization and categorization of Government information in a way that is searchable electronically and interoperable across agencies and organizations.

# StratML Forms, Tools & Service Prototypes


- Documentation & Transformation Services
- CAM Interactive Documentation
- Authoring/Editing Tools
  - Adobe, Xopus, Business Web Software, XForms....
- Tag Cloud
- Atom Demonstration
- Basic Stylesheet
- Farsi Translations & StratML Transformation Portal
- Search Service
- Schema Design

# StratML Forms, Tools & Service Prototypes



- During the development, piloting, proof-of-concept phase, more than 900 strategic plans have been rendered in StratML format, using seven different authoring/conversion tools, including:
  - Microsoft [InfoPath](#) using this [form](#)
  - Adobe PDF Fillable [Form](#)
  - [Xopus Form](#) (Available in Spanish as well as English)
  - [XForms Form](#) for StratML Part 1
  - [XForms Form](#) for Part 2
  - Microsoft Word, with assistance

# StratML Forms, Tools & Service Prototypes



Mark Logic powers this application of selected StratML documents from XML.gov.

Home Search Explore Workspace Projects

Welcome John Q. User! September 09, 2009

### Advanced Search

Full Text

Vision

Mission


### StrategicPlan.xsd – Version 1.0

#### Data Dictionary

Acronym

A proper name, usually composed of the first in the name.

Acronym type string



Strategy & Performance Plans & Reports

Home Statistics Documents Catalog StratEdit XSLTForms DNAOS About Portal Glossary Contact [?]

StratML

**StratML**  
This DNAOS-powered StratML portal, documents, as confirmed by the portal's

**Resources**  
The portal also provides a wide range of tools and resources, including some from documents.

**Strategy Plan & Performance Report**  
Every project and organization requires plans.

**AIM/ANSI Standards**  
AIM and ANSI have been working very

**More on StratML Standards**  
The StratML References section also has and versions.

**StratML Documents**  
The StratML portal provides complete rendered to navigable Web sites accessible, create, edit, and view StratML documents and resources are also available

**Current Content**  
The section menu below provides alphabetical StratML are added regularly. See also

## StratML Parsing Demo

This page demonstrates some of the ways information from Strategic Plans documented in the

### Strategic Plan Goal "Tag Cloud"

Education Advocacy Leadership Mentoring  
Collaboration Partnerships Representation Community  
Human Capital Promotion Education and Training Learning  
Excellence Policy Recommendations Participation Information  
Financial Performance Technology Accountability Operational  
Competitive Sourcing Efficiency and Effectiveness Diversity  
Fraud and Errors (ED) Customer Satisfaction Data and Information  
CERTIFICATION Budget and Performance Integration Supply Chain  
Research and Scholarship Customer Service Management Sustainable  
Management Excellence Capacity Building Platform Dependent Standards Data and Function Sharing  
Platform Independent Military Housing Conformity Assessment Foundational Systems Networking  
Service Conferences Funding Future Environment Organizational Management Standardization Cost  
Savings Scholarship Strategic Goal 6 Safety Health Faith and Community Overseas Presence Round-the-  
Clock Service Critical Needs Strategic Goal 1 Strategic Goal 2 Strategic Goal 3 Data and Information  
Sharing Strategic Goal 5 Strategic Map Member Services Results State Health Insurance (HHS) R&D  
Investment Criteria Knowledge Dissemination Recognition Dispute Resolution Information and

### Information

**StratML for U.S. Federal Agencies**  
You are viewing a feed that contains frequently Common Feed List. Updated information from the feed is available in Internet Explorer and other programs. Like this feed.  
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**Department of Transportation**  
Tuesday, August 26, 2008, 1:00:00 PM  
Department of Transportation (DOT)  
**Vision:** Safe, efficient transportation systems  
**Mission:** The national objectives of general welfare, and require the development of transportation policies and convenient transportation at the lowest cost consistent with the conservation of the resources of the United States.

**Department of Veterans Affairs**  
Tuesday, August 26, 2008, 1:00:00 PM  
Department of Veterans Affairs (VA)  
**Vision:** We will strive to meet the needs of the Nation's even more veteran-focused organization, functioning as a women who have served our Nation; (2) cultivating a dedicated believe in, and take pride in our vitally important mission; (3) service with the best in business and use innovative means to

StratML element in English	Translated Term in Farsi
StrategicPlan	برنامه راهبردی
PerformancePlan	برنامه فعالیت
StrategicPlanCore	هسته برنامه راهبردی
AdministrativeInformation	اطلاعات مدیریتی

78 / 78

78

#### Strategic Plan Form

Source:  
<http://www.whitehouse.gov/omb/budget/fy2009/mgmt.pdf>  
Start: 2001-10-01 End: 2008-12-31 Date: 2007-05-24

Submitter: Organization:


First name: Owen Name: President of the United States


Last name: Ambur Acronym: POTUS

Email Address: [Owen.Ambur@verizon.net](mailto:Owen.Ambur@verizon.net)

[Table of contents](#)

- Vision
- Mission
- Values
  - Citizen Centricity
  - Results Focus
  - Market Based
  - Human Capital
  - 1.1 Citizen Centricity
  - 1.2 Service-Delivery Staffing
  - 1.3 Organizational Realignment





# StratML Forms, Tools & Service Prototypes



### Strategic Plan

Name of Plan:  
Description of P:  
Other Information:  
Organization:  
Acronym:  
Identifier:  
Description of:  
Stakeholder:  
Name:  
Insert item  
Insert item  
Vision:  
Identifier:  
Mission:  
Identifier:  
Values:  
Name:  
Insert item

### StratML Sample Form

Submitter Information  
First Name  
Telephone Number  
Start Date  
Source Information  
Source  
Name  
Strategic Plan  
Vision (+)  
Mission (+)  
Value  
Name  
Description (+)  
Goals  
Goal Name  
Description (+)  
Stakeholders  
Stakeholder Name

### StratML Sample Form

Import XML Export XML Date

Strategic Plan Form

Table of Contents

President-Elect Obama's Change Agenda

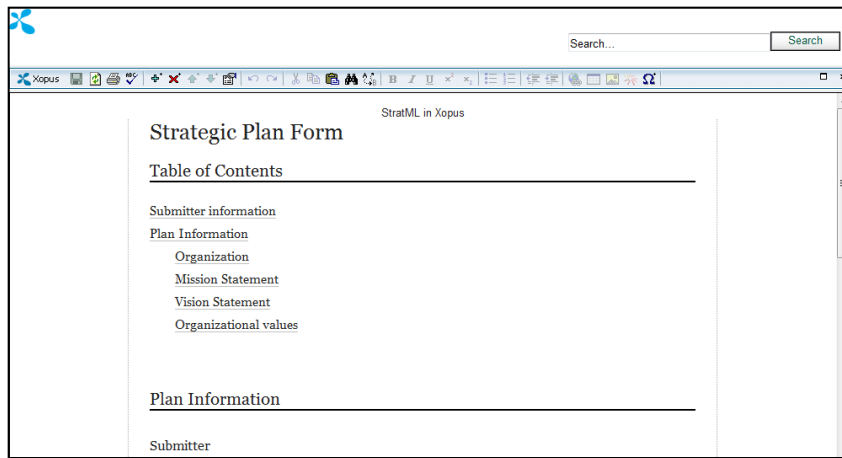
Strategic Plan  
President-Elect Obama's Change Agenda  
Strategic Plan Form

### Strategic Markup Language (StratML) Documents

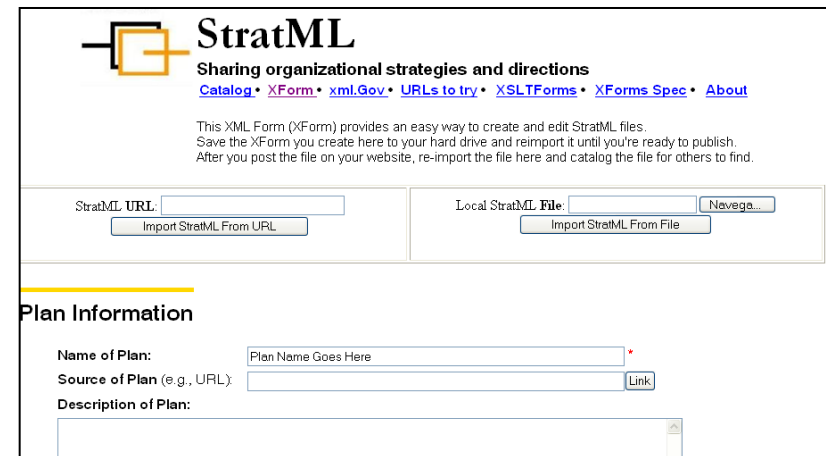
Doc. Acronym	Doc. Name	HTML	Mission Description
FEAPG	A Practical Guide to Federal Enterprise Architecture		To provide guidance to Federal Agencies in initiating, developing, using, and maintaining an enterprise architecture (EA).
POFSA	A Practical Guide to Federal Service Oriented Architecture		To describe a target federal service oriented architecture vision and to provide guidance in the management and governance of enterprise-wide services. To help federal chief architects and chief information officers in their efforts to adopt SOA best practices to further their organizational mission outcomes, meet increasingly demanding compliance requirements, and optimize their IT architectures.
ARMA	ARMA International		The mission of ARMA International is to provide education, research, and networking opportunities to information professionals to enable them to use their skills and experience to leverage the value of records, information, and knowledge as corporate assets and as contributors to organizational success.
ASTM	ASTM International		To be the foremost developer and provider of voluntary consensus standards, related technical information, and services having globally recognized quality and applicability that promote public health and safety, the environment, and the overall quality of life; contribute to the reliability of materials, products, systems and services; and facilitate international, regional, and national commerce.
APA	Academic Pediatric Association		The APA is dedicated to improving the health of all children and adolescents through leadership in education of child health professionals, research and dissemination of knowledge, patient care, and advocacy in partnership with children, families and communities.
AdM	Academy of Management		To enhance the profession of management by advancing the scholarship of management and enriching the professional development of its members.
ASC X12	Accredited Standards Committee X12		ASC X12 brings together business and industry professionals in a cross-industry forum to develop and support electronic data exchange standards and related documents for the national and international marketplace to enhance business processes, reduce costs and expand organizational reach.
AIOB	Action Without Borders		Action Without Borders connects people, organizations, and resources to help build a world where all people can live free and dignified lives.
Advisory Commission			The mission of the Advisory Council on Historic Preservation is to promote the preservation, enhancement

# Group Activity: XForm

1. Creating the plan.
2. Publishing the Plan using Xform to create a StratML Part 1 document.
3. Updating a Plan using Xform in a StratML Part 1 document.



The screenshot shows a web browser window titled "StratML in Xopus". The main content area is titled "Strategic Plan Form". Below this title is a "Table of Contents" section with a list of links: "Submitter information", "Plan Information", "Organization", "Mission Statement", "Vision Statement", and "Organizational values". The "Plan Information" link is highlighted. Below the "Table of Contents" is a "Plan Information" section with a "Submitter" field.



The screenshot shows the StratML website. The header includes the StratML logo and the text "Sharing organizational strategies and directions". Below this is a navigation bar with links: "Catalog", "XForm", "xml.Gov", "URLs to try", "XSLTForms", "XForms Spec", and "About". A paragraph of text explains the XForm: "This XML Form (XForm) provides an easy way to create and edit StratML files. Save the XForm you create here to your hard drive and reimport it until you're ready to publish. After you post the file on your website, re-import the file here and catalog the file for others to find." Below this text are two input fields: "StratML URL:" and "Local StratML File:". The "StratML URL:" field has an "Import StratML From URL" button. The "Local StratML File:" field has a "Navega..." button and an "Import StratML From File" button. Below these fields is a "Plan Information" section with three input fields: "Name of Plan:" (with a placeholder "Plan Name Goes Here"), "Source of Plan (e.g., URL):" (with a "Link" button), and "Description of Plan:".

## Links, documents & references used

- Excellence in financial Management: <http://www.exinfo.com>
- Strategic Planning Workshop: <http://www.slideshare.net/ciellauren/strategic-planning-workshop>
- Strategy Markup Language: Maturing Social Networking Services for Machine Readable Government and the Strategic Semantic Business Web:  
<http://xml.fido.gov/stratml/references/SPIConference20111209.pdf>
- StratML:
  - Joinup (European Commission):  
[https://joinup.ec.europa.eu/catalogue/asset\\_release/strategy-markup-language](https://joinup.ec.europa.eu/catalogue/asset_release/strategy-markup-language)
  - Official site: <http://xml.fido.gov/stratml>
  - Quick start guide: [http://xml.fido.gov/stratml/references/StratML\\_QuickStart\\_Guide.pdf](http://xml.fido.gov/stratml/references/StratML_QuickStart_Guide.pdf)
  - Definition & purposes: <http://xml.fido.gov/stratml/#DefinitionPurposes>
  - Current work & results: <http://xml.fido.gov/stratml/#WorkResults>
  - Schema: <http://xml.fido.gov/stratml/#xsd>
  - Forms: <http://xml.fido.gov/stratml/#Forms>
  - Search and prototypical services: <http://xml.fido.gov/stratml/#Services>
- US HUD Strategic Planning Resources: <http://portal.hud.gov/hudportal/HUD>



**Thank you very much!!**

<http://www.computer.org/eGov>

<http://sites.ieee.org/spain-tmc/>



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**about.me** <http://about.me/estatic>